



Estimate of Benefits— Information Form Date: _____

Client Name: _____

Property Address: _____

Contact Name: _____

Phone: _____ Fax: _____ Email: _____

Project Name: _____

1. Cost Basis of property: _____
2. Notice of Substantial Completion date (Month/Year): _____
3. Purchased or constructed? _____
4. If Purchased, month/year of original construction: _____
5. If Purchased, does an appraisal report exist? _____ Yes _____ No
6. If Constructed, Notice to Proceed Date (month/year): _____
7. Type of building (mfg, office, restaurant, etc.): _____
8. Major industry category of tenant: _____
9. Property Ownership (C or S Corp, LLC, Partnership, etc.): _____
10. Do you plan on holding to the property for 5 years? _____ Yes _____ No
11. Square footage of building: _____ Square Footage of property (gross): _____
12. Number of Floors: _____
13. Number of Tenants/Units: _____
14. Is building freestanding? _____ Yes _____ No
15. Were any improvements made to the building or property? ____ Yes ____ No
If yes, what month/year(s) _____ Amount of improvements: \$ _____
16. Is there more than one building on the site? ____ Yes ____ No If yes, how many _____
17. Do "As Built" blueprints, site plan, and/or ALTA survey and construction records (AIA Documents) exist for each building? ____ Yes ____ No If not, can they be obtained from another source? ____ Yes ____ No
18. Are you currently paying income taxes? _____ Yes _____ No
19. What are the effective Federal and State tax rates for the entity owning the real estate?
Federal _____ % State _____ %
20. Please supply a copy of the regular tax depreciation schedule for the entity owning the real estate.
Questions? Call Marc Berg or John Schuetz at 949-305-7290 (mobile 949-939-2886/949-230-5120)